

## Sample IRA Custodian Letter for Qualified Charitable Distributions

**PLEASE NOTE:** OSF HealthCare Foundation is a supporting organization for the OSF HealthCare System. In order to meet the requirements set forth by Congress and the IRS, Qualified Charitable Distributions must be made to **OSF HealthCare System**. You may designate the area of our OSF Ministry you wish to support with your gift.

Date \_\_\_\_\_

Dear IRA Custodian,

The **Protecting Americans from Tax Hikes Act of 2015**, permits a rollover directly from an IRA to a qualified public charity, up to \$100,000 per year per individual IRA owner. This rollover counts as a Qualified Charitable Distribution (QCD). The amount I rollover to a qualified public charity will count towards my RMD, to the extent the RMD has not already been taken. (Note: CARES Act waived RMD in 2020)

As the owner of IRA account # \_\_\_\_\_ that is in the custody of your organization, I request that you transfer from that account the sum of \$ \_\_\_\_\_ to **OSF HealthCare System**, FEIN # 37-0813229. I request a notation be added that my gift is to be used to support \_\_\_\_\_.  
OSF Medical Center/Hospital or Program

This letter is sufficient authorization to confirm my intention to make a Qualified Charitable Distribution (QCD) to **OSF HealthCare System** from my IRA. If you require any further documents, please contact me at \_\_\_\_\_.

Thank you.

\_\_\_\_\_  
IRA Owner

### To mail a check, please mail to:

OSF HealthCare Foundation  
ATTN: Micki McCarthy  
530 NE Glen Oak Avenue  
Peoria, IL 61637

### For Wire or ACH transfers:

Please contact Kim Rapp, Senior Financial Analyst for OSF HealthCare Foundation at (309) 683-9318 for instructions.